

## Tax Refund Application Form

*If you have any queries filling out this form please contact us ... we are here to help!*

Please tick the tax year(s) you want to complete the tax return(s) for:

Year from 6 April 2013 to 5 April 2014

Year from 6 April 2012 to 5 April 2013

Year from 6 April 2011 to 5 April 2012

Other (please specify)

### Section 1: Personal and contact information

*The security of your personal information is of paramount importance to us. All information will remain confidential and secure. We are a registered agent with HM Revenue & Customs and we are bound by the Data Protection Act.*

1. First Name:

2. Middle Name:

3. Last Name:

4. Date of Birth:

5. Full Address

6. Postcode:

7. Previous address(es) and Postcode(s)

*Only required if you moved within the last 4 years*

*Use separate sheet of paper if you need more space*

8. Telephone(s):

9. E-mail:

10. U.T.R. Number:

11. NI Number:

12. Marital status:

#### **Government Getaway Login Details (if known)**

*We will be able to submit your tax return through your personal account with HMRC. Provide login details if you have already registered with HMRC to submit your tax returns online. If not, we will attempt to register you for HMRC online services.*

13. User ID (if known)

14. Password (if known)

## Section 2: Self employment

15. Were you self employed?

**Yes, continue with Section 2**

**No, go to Section 3**

### 2.1 Income Self employment

*Please insert your Gross or/and Net Income*

16. Gross Income

*Gross Income is the income received before any tax deductions*

17. Net Income

*Net Income figure is the money received to the bank account after tax has been deducted*

18. What tax rate has been deducted?

20% standard rate

30% high rate

NO tax deductions

### 2.2 Expenses Self employment

*Business related expenses*

19. Labour costs

*If you have employed any workers or engaged any sub-contractors you must be registered with HMRC as a contractor/employer. Please let us know if you require such registration. If you have been registered, please provide your Employer's Reference number below (PAYE reference number)*

20. PAYE reference number

*(ONLY if you are registered as employer/contractor)*

21. Costs of goods used

*(materials, tools: hire and purchase)*

22. Premises costs *(rent, rates, bills, repairs etc)*

23. % of business use for Premises costs

*The certain proportion of your home costs can be allowed if you had two or more sites/clients during the year and if you had used your home as a base of your business, i.e. kept tools of his trade at home and carried out the management of the business from home.*

## 2.2 Expenses (continue)

24. Travel expenses (public transport, taxi)

25. % of business use for Travel costs

*Only the business part of travel expenditure is allowable. The travel between work and home is ONLY allowed if you have been travelling to two or more sites/clients during the year and you either had no defined base of operations or your home was used as a base for business operations.*

26. Telephone, internet, stationery & other office cost (ONLY business use proportion)

27. Other business related expenses (for example, accountancy fee, interest and bank charges, training, insurance etc)

### ***AIA (Annual Investment Allowance)***

28. Have you purchased any of the following during the year?  
Computers and all kinds of office furniture and equipment  
Vans, lorries, trucks, cranes and diggers  
Any other plant and machinery or fixtures and fittings

YES, list the amount below

NO, continue with the Section 2

29. Specify the amount (% business use ONLY)

### ***Vehicle use***

30. Have you used motor vehicle for the business during the year?

YES, continue with the questionnaire

NO, please move to Section 3n

31. What type of the vehicle is it?

van/car

motorbike

32. Car/van running costs (fuel, insurance, repairs, MOT, parking, tolls, Road Tax etc)

33. What percentage of above vehicle costs are business use?

34. How many business miles have you travelled during the year?

35. Purchase price of the vehicle (only cars or motorbikes)

36. CO<sub>2</sub> (carbon dioxide) emission rate  
*Check your car's CO<sub>2</sub> emissions on the Vehicle Certification Agency (VCA) website*



### 3.3 Expenses employment

53. Have you had any employment related expenses?

NO, got to Section 4

YES, continue with the questionnaire

54. Have you used private vehicle for business purposes? (*travel between home and work is not allowable, ONLY business trips*)

NO, go to Question 58

YES, please list incurred business miles below

55. Business miles - cars and vans

56. Business miles - motorbikes

57. Business miles - cycle

58. Other employment related expenses (*e.g. business trips (hotels, meals, business calls, professional fees and subscriptions etc)*)

59. Have you received any payments from the employer to cover these expenses?

NO, go to Section 4 Question 61

YES, please specify the amount below

60. Payments from employer to cover employment related expenses

### Section 4: Other income

61. Did you receive other income during this period?

YES, continue with Section 4

NO, go to Section 5

**Did you receive any income from:**

*List the amounts below*

62. UK land or property?

63. Interest (e.g. bank, building society etc)?

64. Dividends (income from shares)?

65. UK Pensions (e.g. State Pension etc)

66. Incapacity or Job Seekers' Benefits

67. Any other income (please specify)

68. Did you pay into personal pension plan?

NO, go to Question 70

YES, list the amount below

69. Payments into personal pension plan

70. Were you entitled to receive Child Benefit?

YES

NO

## Section 5: Tax Refund

Any repayment from HMRC (Tax Office) will be transferred directly to the bank account of your choice. The account does not have to be in your name and can be sent to a nominees account.

Due to new money laundering regulations we will only transfer funds to a UK bank account.

**Note that repayment will only be released after you have paid the fee to Capital Agency for the services provided.**

71. Name of the bank

72. Name of the account holder

73. Sort code

74. Account number

## Section 6: Declaration

Please sign to state that you have read and agree to our terms and conditions, and that you confirm that the information you have provided is accurate and correct to the best of your knowledge.

75. Sign or print your name (if completed online)

76. Date

**Now send this form to us:**

If you are sending **by email** please email to: **info@capitalagency.org.uk**

If you are sending **by post:**

Capital Agency Partnership

Kemp House

152 City Road

London EC1V 2NX

### Capital Agency Terms and Conditions

#### Introduction

Capitalagency.org.uk is owned and operated by Capital Agency Partnership

These Conditions (together with the documents referred to in them) set out the terms and conditions on which we offer to supply our services to you. Please read these Conditions carefully. References in these Conditions to "you" and "your" refer to you, the customer. References to "we", "us", "our", "Tax Ref" and "www.capitalagency.org.uk" refer to Capital Agency Partnership.

#### Advice

If we give you advice via the telephone, live chat support, text or email, any statements made via these communication methods should not be relied upon.

#### Submission of Self-Assessment Tax Return

You acknowledge and agree that, as part of the Self Assessment Services, we may submit to HMRC on your behalf a self assessment tax return online without sending a copy of the form to you for your approval prior to the submission of the form.

#### Price and Payment

Tax returns will be submitted on a fixed fee basis starting from £50. Each tax return will be priced individually depending upon its complexity. This low cost fee includes the calculation of tax liability / refund and Class 4 National Insurance Contributions, online submission of tax return to H M Revenue & Customs (HMRC) and checking HMRC for processed calculations. Our fee must be paid before we complete and submit the tax return to HMRC for you. If you are successful and are due a refund it will be transferred directly to the bank account of your choice

#### UK Bank Transfers

In the event of incorrect bank details being provided to Tax Ref resulting in a bank transfer being returned, any further bank transfer will not be free and will incur additional charges. You acknowledge and agree that our fees are non-refundable. If, as a result of a subsequent investigation or enquiry by HMRC, any tax rebate received by you becomes repayable to HMRC for any reason whatsoever, including (without limitation) the provision of incorrect information by you, we shall not be liable to refund to you any fee paid to us in relation to such rebate.

#### Our liability

We shall not be liable for any loss, damage or costs (including, without limitation, legal fees) resulting from (i) incorrect information provided by you; (ii) the loss or delay of any form, document or other paperwork in the post; (iii) any mistakes or errors made by HMRC; (iv) Any refusal by HMRC to grant a tax refund; or (v) any delay caused directly or indirectly by HMRC. We accept no liability for any loss of income or revenue, loss of business, loss of profits or contracts, loss of anticipated savings, loss of data, waste of management or office time or for any indirect or consequential loss or damage of any kind, however arising, and whether caused by tort (including negligence), breach of contract or otherwise, even if foreseeable.